

EXTRACT



Market Trends

MARKET

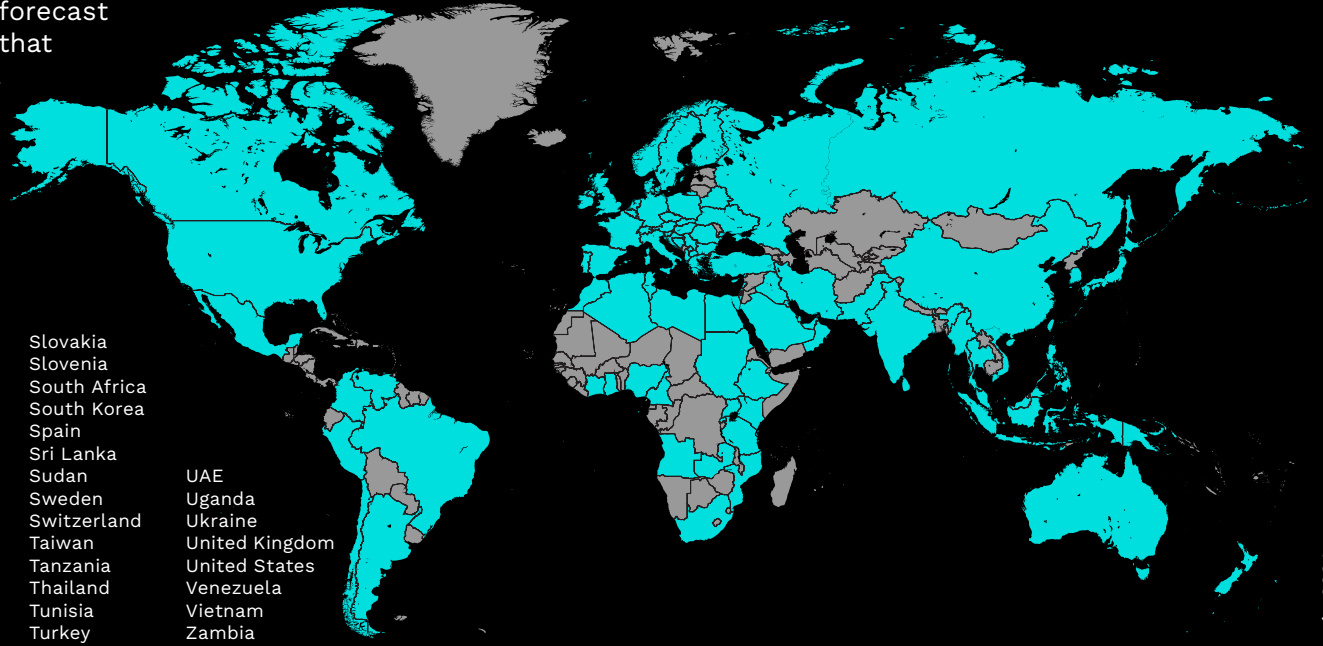
**The Financial Services Consulting
Market in 2024**

Report

Oct 2024

What's included in this report

Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the future.



Geography model

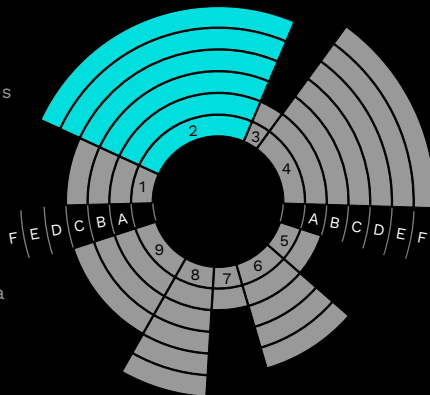
■ Countries covered

Albania	Chile	Greece	Libya	Pakistan	Slovakia	
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia	
Angola	Colombia	Hungary	Malaysia	Peru	South Africa	
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea	
Australia	Croatia	Indonesia	Morocco	Poland	Spain	
Austria	Cyprus	Iran	Mozambique	Portugal	Sri Lanka	
Bahrain	Czech Republic	Iraq	Myanmar	Qatar	Sudan	UAE
Belarus	Denmark	Ireland	Netherlands	Romania	Switzerland	Uganda
Belgium	Egypt	Israel	New Zealand	Russia	Taiwan	Ukraine
Bosnia	Ethiopia	Italy	Nigeria	Rwanda	Tanzania	United Kingdom
Brazil	Finland	Japan	North Macedonia	Saudi Arabia	Thailand	United States
Bulgaria	France	Kenya	Norway	Serbia	Tunisia	Venezuela
Cameroon	Germany	Kuwait	Oman	Singapore	Turkey	Zambia
Canada	Ghana	Lebanon				

Sector model

Sectors

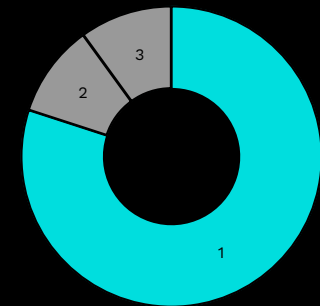
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

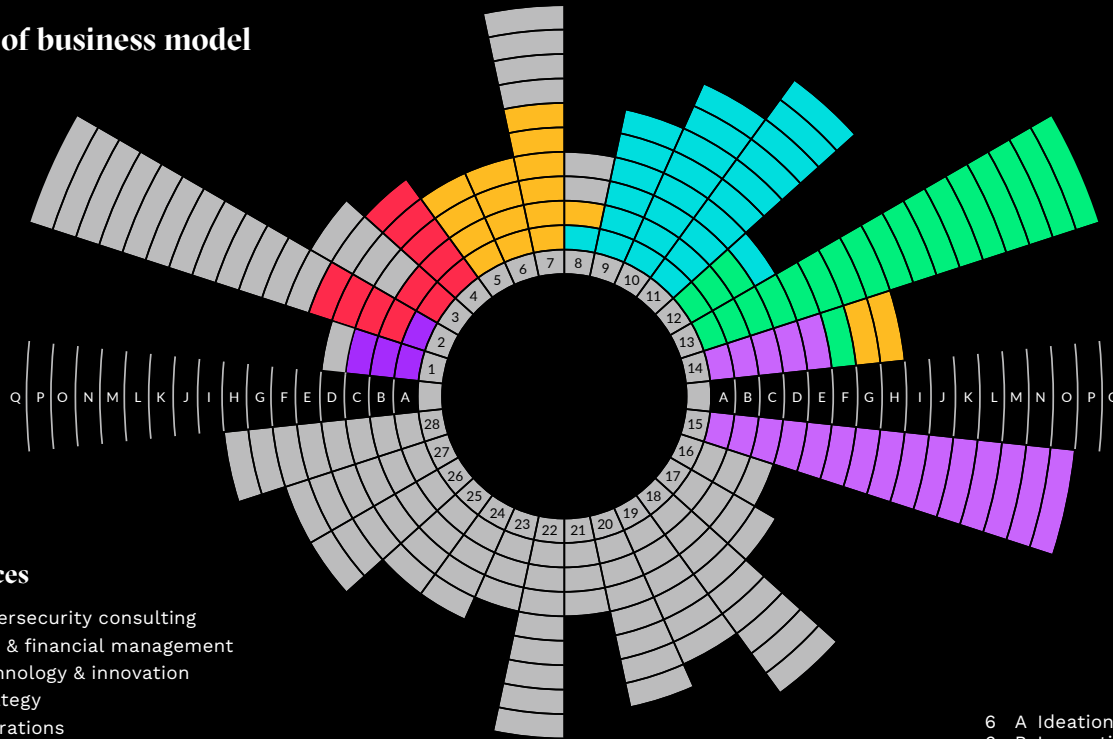
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics | 8 D Real estate |
| 2 B Capital markets | 4 E Consumer packaged goods | 8 E Transportation |
| 2 C Insurance | 4 F Industrial products | 9 A High-tech |
| 2 D Investment and wealth management | 5 A Pharma | 9 B Media |
| 2 E Private equity | 6 A Defence | 9 C Telecoms |
| 3 A Healthcare | 6 B Education | |
| | 6 C Not-for-profit | |
| | 6 D Public sector | |
| | 7 A Retail | |

The revenue-earning model



- 1 Consulting
- 2 Managed service
- 3 Other (contingent fees, software licensing, associate networks)

Line of business model



Services

- Cybersecurity consulting
- Risk & financial management
- Technology & innovation
- Strategy
- Operations
- HR, change & people strategy

Line of business

- | | |
|---------------------------------|------------------------------|
| 1 Cybersecurity | 20 Legal |
| 2 Risk | 21 Litigation |
| 3 Forensic | 22 Marketing & creative |
| 4 Financial management | 23 Network engineering |
| 5 Design & UX | 24 Product engineering & R&D |
| 6 Innovation | 25 Recruitment |
| 7 Technology | 26 Software engineering |
| 8 Data & analytics | 27 System integration |
| 9 Research | 28 Tax |
| 10 Deals | |
| 11 Strategy | |
| 12 Real estate | |
| 13 Operations | |
| 14 Sustainability | |
| 15 HR & change | |
| 16 Architecture | |
| 17 Audit & assurance | |
| 18 Business process outsourcing | |
| 19 Civil engineering | |

Capabilities

- | |
|--|
| 1 A Cybersecurity advice |
| 1 B Cybersecurity incident response |
| 1 C Penetration testing & wargaming |
| 2 A Technology & security risk services |
| 2 B Operational risk |
| 2 C Programme risk |
| 2 D Responding to regulation |
| 2 E Risk management |
| 3 A eDiscovery |
| 3 B Forensic accounting |
| 4 A Budgeting/financial planning process |
| 4 B Debt advisory |
| 4 C Finance function |
| 4 D Financial advisory |
| 4 E Financial restructuring & insolvency |
| 5 A Corporate identity |
| 5 B Customer journey & UX benchmarking |
| 5 C Graphic & UI design |
| 5 D UX & service design |
| 6 A Ideation |
| 6 B Innovation management |
| 6 C Innovation strategy |
| 6 D Strategies for growth from innovation |
| 7 A Cloud advice |
| 7 B ERP consulting |
| 7 C IT strategy, planning & review |
| 7 D IT training |
| 7 E Programme management |
| 7 F Vendor selection |
| 8 A Advanced analytics |
| 8 B Data visualisation, business intelligence & semantic layer |
| 9 A Customer feedback |
| 9 B Customer segmentation |
| 9 C Employee feedback |
| 9 D Environmental & social impact research |
| 9 E Macro/microeconomic research |
| 9 F Market research |
| 10 A Capital allocation strategy |
| 10 B Commercial due diligence & valuation |
| 10 C Financial due diligence |
| 10 D M&A transaction strategy |
| 10 E Operational due diligence |
| 10 F Portfolio & investment strategy |
| 10 G Public-private partnerships |
| 10 H Technology due diligence |

- | |
|---|
| 11 A Business & financial modelling |
| 11 B Category management |
| 11 C Channel management |
| 11 D Corporate recovery & turnaround |
| 11 E Corporate restructuring |
| 11 F Corporate strategy |
| 11 G Market analysis & strategy |
| 11 H Policy formulation |
| 11 I Pricing |
| 11 J Strategic sourcing/offshoring services |
| 12 A Corporate, occupier services & facilities management |
| 12 B Integrated real estate developer services |
| 12 C Real estate deal/transaction services |
| 12 D Real estate strategy |
| 13 A Benchmarking |
| 13 B Business continuity & recovery |
| 13 C Cost cutting |
| 13 D Customer service |
| 13 E DevOps |
| 13 F Distribution strategy |
| 13 G Lean & Six Sigma |
| 13 H Operational review |
| 13 I Outsourcing advice |
| 13 J Post-M&A integration |
| 13 K Process design, re-engineering & automation |
| 13 L Procurement/purchasing |
| 13 M Property & estate management |
| 13 N Sales & distribution planning |
| 13 O Sales force effectiveness |
| 13 P Supply chain management |
| 13 Q Target operating model |
| 14 A Purpose-led strategy & change |
| 14 B Resource-efficiency implementation |
| 14 C Resource-efficiency strategy |
| 14 D Social impact & trust |
| 14 E Sustainable investment |
| 14 F Sustainable supply chain |
| 14 G Clean technology |
| 14 H Green IT |
| 15 A Benefits, compensation & pensions, excluding actuarial & investment advice |
| 15 B Change management |
| 15 C Diversity & inclusion |
| 15 D Employee engagement |
| 15 E Governance & board effectiveness |
| 15 F HR strategy & effectiveness |
| 15 G Leadership |
| 15 H Organisational design & culture |
| 15 I Organisational training & development |
| 15 J Outplacement |
| 15 K Pension fund evaluation & advice |
| 15 L Performance management |
| 15 M Stakeholder management |
| 15 N Talent management |
| 15 O Team effectiveness & collaboration |

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Underpinned by our MegaModel, our reports deliver an independent and objective understanding of the markets that matter most; including everything from key trends and growth opportunities to the latest views of consulting leaders and a detailed analysis of the buyer's voice.

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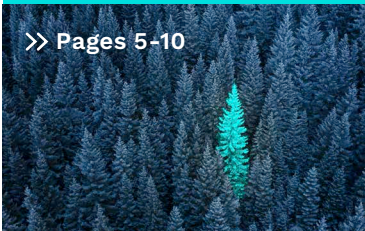
What really matters

We identify the things that really matter to firms—a snapshot of the most important dynamics in the market.

The big answers

We ask Source's experts what they think are the big opportunities and risks in today's market.

>> Pages 5-10



2

Market overview

Bringing together our market data, forecasts, and analysis, we provide a comprehensive picture of the state of play from a geographical, sector, and line-of-business perspective.

>> Pages 11-23



3

Client priorities

Using data from our survey of senior buyers of consulting, we explore the most important priorities, opportunities, and challenges for clients.

>> Pages 24-37

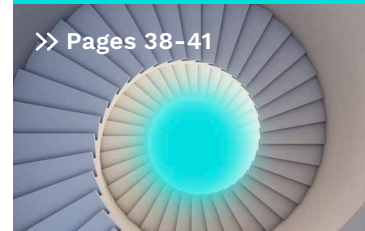


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Implications for firms

We take a look at the factors influencing clients' buying behaviours, and what this means for the services firms provide.

>> Pages 38-41



5

Insights from consultants

In this series of interviews, senior leaders from professional services firms offer their perspectives on what really matters in the market today.

>> Pages 42-48



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“On the business modernisation side, over the next two to three years, it’ll be highly transformative for companies to have understood the power of technology.”

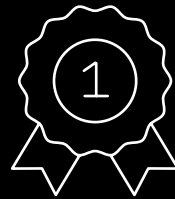
Srinivasa Kumar Yerchuru, TCS

What really matters

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- The big answers... on the financial services consulting market9

3

Clients are **willing to pay a premium** for work that requires a high level of expertise, but are also looking for capacity support across the sector.



59%

of clients say expertise is important when choosing a firm from a shortlist

Another prominent narrative that we saw in this sector was a need for talent. A huge majority of clients we polled in the sector discussed their difficulty in attracting talent with the right expertise in areas where they needed support, such as cybersecurity. They were looking for capability in growth strategy, and they were eager to find levers that allowed them to expand their revenue streams.

Clients continue to pay high prices for projects which need significant expertise, particularly strategy work, as clients seek to overhaul their operating models, as part of larger investments in business strategy. Many more clients are looking to increase their spending this year than in 2023, and there will likely be plenty of work in the sector for firms that are looking to target expertise-heavy bespoke projects.

However, clients are also in need of capacity support across the sector. While it often comes at a lower price point, clients are looking to expand the amount of such work they are doing this year. Firms that provide such support could also get preferential access to work requiring more expertise in the future, which will come at a higher price point.

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Market overview

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“There was a lot of nervousness coming into this financial year given macroeconomic uncertainty, geopolitical tensions, and half the world’s population going to the polls. This led to a lot of uncertainty.”

Simon Kent, Kearney

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“There has been more focus on strategic cost reduction, regulatory compliance and enhancing business resilience. However, more recently there are indications of increased discretionary spending, for example, technology transformation and M&A.”

Alex Birkin, EY

Client priorities

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Clients are experiencing severe issues attracting talent

Compounding their workforce issues, 91% of firms report at least moderate difficulty attracting talent. There are four key areas where there is significant overlap between where clients need to recruit current expertise and where they believe they will need capability over the next three years: cybersecurity, increasing revenue, growth strategy, and developing new products and services.

While clients typically build their plans for growth in-house, in the belief that they know their business better than any consultant, the fact that the latter three areas point to a lack of internal expertise in this area suggests there is an opportunity for firms to step in and advise.

Meanwhile, clients need cybersecurity talent as part of a broader strategy of increasing their resilience against external shocks, and firms that can provide this expertise are likely to be well-placed to win work.

Figure 13

To what extent are you struggling to attract the right talent in your organisation?

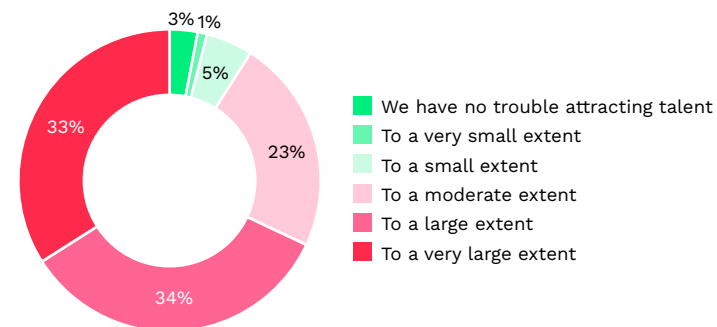
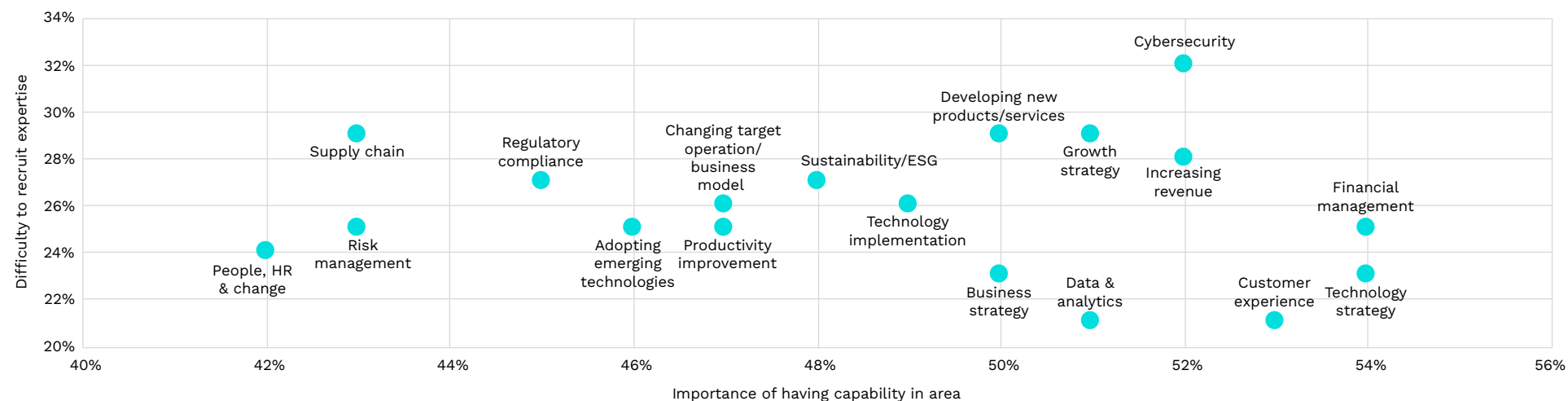


Figure 14

Areas that clients feel are important to have expertise in compared to areas that are difficult to recruit

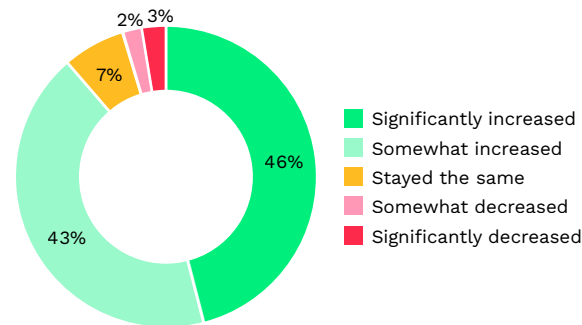


Where are clients set to invest?

Clients are increasing their spending on digital technology and will continue to do so

Figure 16

How has your organisation's investment in digital technology changed in the last year?



Clients are already increasing their investment in digital technology and anticipate spending much more in future. This is driven by the desire to match their competitors and to modernise their systems, which may be outdated in places.

However, there is a significant sub-sector split in why clients are looking to increase their spending on digital technology. Private equity and insurance clients believe that they haven't invested enough in previous years, while clients in the capital markets sub-sector are primarily concerned with matching their competition. Clients in the insurance sector also said that their investment in digital technology would make them a more resilient business. Those in the investment and wealth management sub-sector say that their systems are up to date and don't need modernisation, but they are looking to increase their spending to improve the quality and range of their data, presumably in order to take full advantage of opportunities offered by generative AI. Meanwhile, clients in the banking sector told us that increasing their digital spend would improve productivity.

Firms looking to offer high capability projects centering on digital technologies should make sure they bear these sub-sector disparities in mind.

Figure 17

How do you expect your organisation's investment in digital technology to change in the next 18 months?

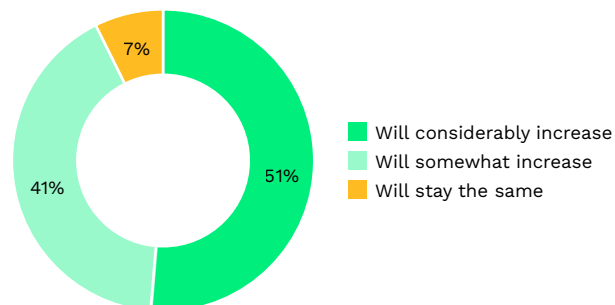
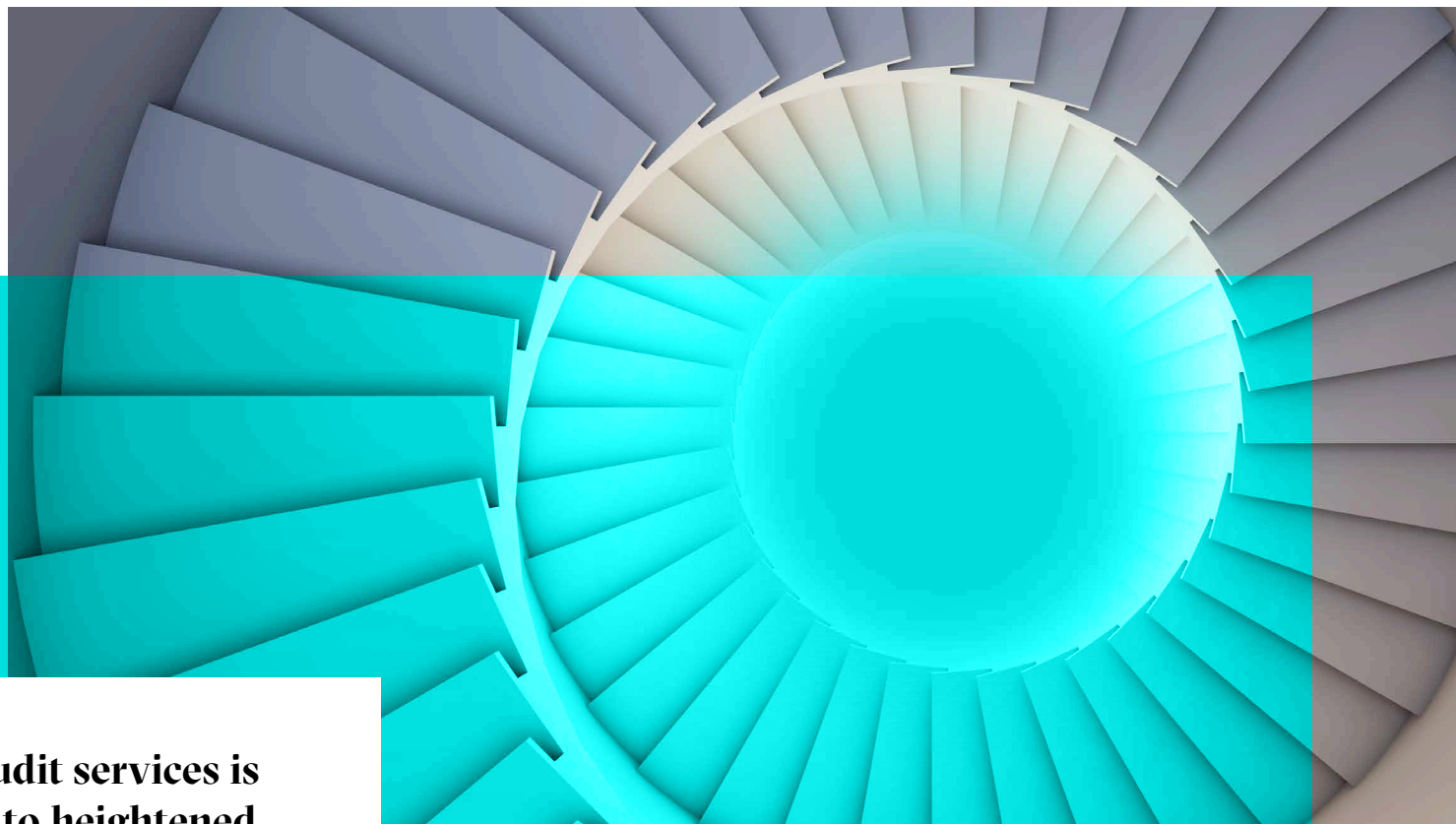


Figure 18

What is the main reason for the increased investment in digital technology in the next 18 months?

	Banking	Capital markets	Insurance	Investment & wealth management	Private equity
To keep up with competitors	#3	#1		=#2	=#2
We haven't invested as much as we should		=#2	#1		#1
To improve customer experience	#2	=#2		=#2	=#2
To give us better data and information			#3	#1	
To improve productivity	#1				=#2
To make us a more resilient business			#2		
To make us a greener business					



“Demand for audit services is increasing due to heightened assurance requirements around internal controls, regulatory compliance, and climate reporting.”

Karim Haji, KPMG

Implications for firms

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Price pressures are easing—but only slightly

We've seen a reduction in pressure on consulting fees in our latest survey. From 2023 to 2024, the number of clients saying that they expected prices to go up increased from 34% to 50%. This is likely a reflection of a change in the nature of the work that clients are looking for, with more strategic projects becoming increasingly prominent.

However, 36% of clients expect prices to fall—not an insignificant proportion, despite being smaller than the 50% who said the same last year. The standout reason clients expect to pay less in consulting fees in the next year is that they feel many firms could do the work—a reminder to firms to emphasise what they bring to the table that others don't. It is also notable that a portion of clients expect to pay lower fees because they need capacity rather than expertise. While this kind of work is indeed likely to come at a lower price point, it could lead to other projects in the future.

Figure 27

To what extent do you think that the prices consulting firms charge you will increase or decrease over the next 12 months?



Figure 28

Reasons why clients think prices they pay for external support will increase/decrease

Increase

1 We expect a high return on investment

2 Methodology for remote delivery is clear

3 Our needs are unique

4 The work is strategically important

Decrease

1 Many firms could do the work

2 Some work could be offshored

3 We need capacity rather than expertise

4 Similar work was cheap in the past

5



“Clients are starting to understand the costs of maintaining older systems. They need to modernise to reduce the risks related to these older systems.”

Scott Mullen, North Highland

Insights from consultants

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“The key is to listen to your clients. Talk to them about their preferences and tailor the solutions to them.”

Peter Curry, Source

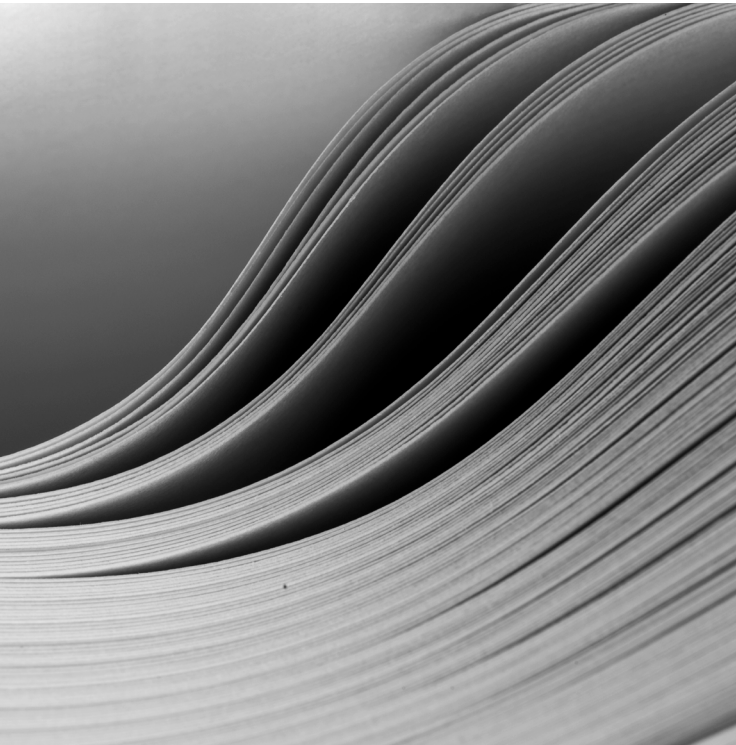
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Our approach to gathering data

The market for professional services is vast and highly dynamic, with deep roots spread out across the business world. The Source MegaModel helps you get to grips with the facts.

The MegaModel is the largest and most comprehensive database of its kind, anywhere in the world. It's used by the world's leading firms to identify where growth is coming from, which markets to invest in, and which sectors are driving demand.



Methodology—The MegaModel

MegaModel: Our Global Data Model

The quantitative market data in this report comes from our unique model of the global professional services market.

Rather than making high-level assumptions, this model has been built from the bottom up, sizing the market capability by capability—assessing how much work a firm earns delivering each professional capability within each sector and country. This results in a robust view of the size of the supply-side market, which can then be broken down to view the size of the market by country, sector, line of business, capabilities, and service.

Alongside this market segmentation, we also limit our market sizing and analysis to what we at Source call “big consulting”—work done by mid and large-sized firms (those with more than 50 people). Please note that we don't track the long, thin tail of work done by contractors and very small firms, as most readers of this report would not seek or be able to compete in this part of the market.

All of the data in the model is calibrated through extensive interviews with, and surveys of, professional services firms and their clients, allowing us to discuss broader trends in the market alongside detailed dimensions such as headcount. These interviews and surveys are supplemented with desk research, which allows us to assess the impact of wider macroeconomic trends on professional services. This, combined with our detailed modelling, results in a long-term view of the market that is able to support both historic and forecast data.

All figures given in this report are in US dollars.

US dollar to British pound US\$1 = £0.80

US dollar to euro US\$1 = €0.92

The data in this report is rounded to the nearest whole number or stated decimal place. As a result, totals may display small discrepancies.

Who did we speak to

Client perspective

We carry out a client survey to help us build a rich picture of how different trends in the financial services sector are affecting clients' organisations and their use of consulting. Our survey focuses on trends in the financial services sector, providing detailed insights into the nuances of the market. For this, we surveyed 150 senior clients of consulting firms from across the financial services sector, all of whom work in organisations with more than 1,000 employees. This survey focuses on the following areas:

- How they expect to use consultants during the second half of 2024 and throughout 2025
- Factors that affect the way clients work with consulting firms
- The ways consulting firms market themselves to clients and the impact this has on client decision making.

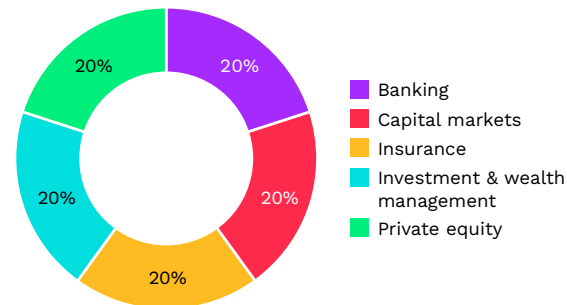
Insights from consultants

Throughout the year, Source analysts remain plugged in to the global consulting market through our bespoke research and consulting projects, adding further depth to our understanding of the consulting industry.

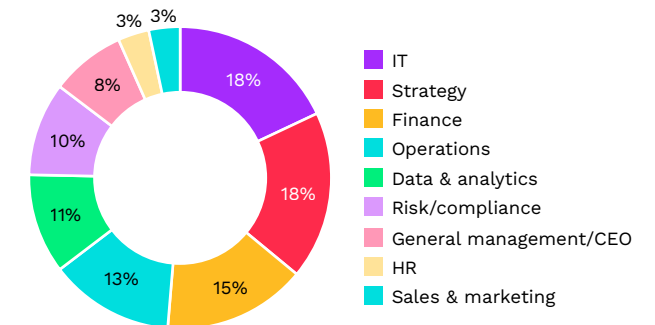
In-depth desk research

We also conducted a thorough PEST analysis in the financial services sector that drills down into finer macroeconomic details on a holistic and sector-by-sector basis and allows us to fit our research into a wider macroeconomic picture.

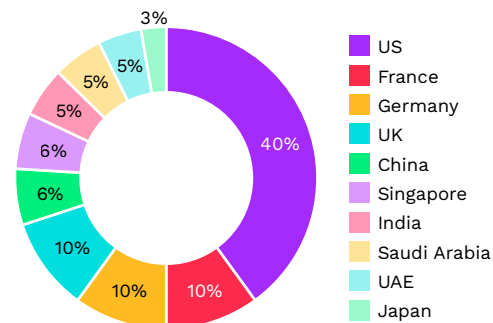
Respondents by sub-sector



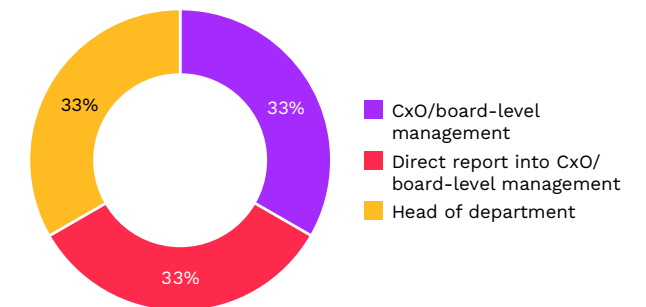
Respondents by function



Respondents by region



Respondents by seniority



Definitions of sectors and services

Sectors

Energy & resources

Energy

Includes the exploration and production of energy, including oil, gas, coal, and renewables.

Utilities

Includes the delivery of electricity, gas, water, sanitation, and other related services.

Primary resources

Includes agriculture, chemicals and chemical products, commodities, forestry, fishing, metals, mining, and plastics.

Financial services

Banking

Includes retail banking, commercial banking, and lending.

Insurance

Includes general insurance (e.g., motor, home, pets, health—anything on an annual contract), life insurance, pension products, and retirement planning.

Private equity

Includes both consulting work for private equity firms and consulting work with private equity portfolio businesses.

Capital markets

Includes investment banking, trading of stocks and financial products, corporate finance, and broking.

Investment and wealth management

Includes private banking, high net-worth banking, investment management, trust funds, the management of pension funds, and asset management.

Manufacturing

Aerospace

Includes space research and technology, the manufacture of aircraft, aircraft parts, rockets and other space equipment, and tanks and ammunition.

Automotive

Includes the manufacture of motor vehicles, industrial vehicles, and vehicle supplies and parts.

Construction

Includes surveying, architectural, and engineering services, heavy construction, house building, and the building of infrastructure.

Consumer packaged goods

Includes the manufacture of clothes, foods, alcohol, tobacco, furniture, home furnishings, cleaning products, small arms, children's toys, and sports equipment.

Consumer and industrial electronics

Includes electrical components, household and industrial appliances, commercial and professional equipment.

Industrial products

Includes industrial machinery, steel and metal products, and plastic products.

Pharma & life sciences

Includes research into and the production of drugs, biological products, medicinal chemicals, and life sciences.

Healthcare

Includes private and publicly-funded healthcare, hospitals, laboratories, and medical equipment.

Public sector

Government

Includes federal/national, state/regional, local government, emergency services, justice, social services, public transport, and conservation.

Education

Includes public and private schools, universities, and libraries.

Defence

Includes national security and consulting around defence issues.

Not for profit

Includes non-commercial research organisations, religious, political and professional membership organisations, trusts, labour unions, and business associations.

Retail

Includes the selling of clothes, food, consumer goods, and automobiles.

Services

Logistics

Includes warehousing, storage, packing and crating, and distribution including cargo, freight, and haulage.

Business services

Includes services relating to law, accountancy, IT maintenance, security systems, advertising, employment agencies, and vehicle leasing.

Leisure

Includes museums, art galleries, theatre, golf courses, hotels, hospitality, travel agencies, restaurants, and bars.

Real estate

Includes estate agencies and operators of residential and commercial buildings.

Transportation

Includes private and people-related transportation, including airlines, airport management, train operators, rail infrastructure management, water transportation, courier services, and private bus services.

Technology, media & telecoms

Telecoms

Includes telephone, mobile, digital, and other communication services.

High-tech

Includes IT-related devices, computer and computer-related devices, audio and video equipment, broadcasting and communication equipment.

Media

Includes radio, television, and digital broadcasting stations and services as well as printing and publishing of newspapers, periodicals, and books.

Services

We've taken the lines of business and capabilities from our taxonomy that broadly align with traditional definitions of consulting and divided them into services that include the following. Please note that for some lines of business, for example, forensics, we've taken a subset of the relevant capabilities and excluded others.

Cybersecurity consulting

Cybersecurity advice, Cybersecurity incident response, Penetration testing & wargaming, Technology & security risk services.

HR, change & people strategy

Benefits, compensation & pensions, excluding actuarial & investment advice, Change management, Diversity & inclusion, Employee engagement, Governance & board effectiveness, HR strategy & effectiveness, Leadership, Organisational design & culture, Organisational training & development, Outplacement, Pension fund evaluation & advice, Performance management, Stakeholder management, Talent management, Team effectiveness & collaboration, Resource-efficiency strategy, Purpose-led strategy & change, Resource-efficiency implementation, Social impact & trust.

Operations

Benchmarking, Business continuity & recovery, Cost cutting, Customer service, DevOps, Distribution strategy, Lean & Six Sigma, Operational review, Outsourcing advice, Post-M&A integration, Process design, re-engineering & automation, Procurement/purchasing, Property & estate management, Sales & distribution planning, Sales force effectiveness, Supply chain management, Target operating model, Sustainable supply chain, Corporate, occupier services & facilities management, Integrated real estate developer services, Real estate deal/transaction services.

Risk & financial management

Operational risk, Programme risk, Responding to regulation, Risk management, Budgeting/financial planning process, Debt advisory, Finance function, Financial advisory, Financial restructuring & insolvency, eDiscovery, Forensic accounting.

Strategy

Capital allocation strategy, Commercial due diligence & valuation, Financial due diligence, M&A transaction strategy, Operational due diligence, Portfolio & investment strategy, Public-private partnerships, Technology due diligence, Business & financial modelling, Category management, Channel management, Corporate recovery & turnaround, Corporate restructuring, Corporate strategy, Market analysis & strategy, Policy formulation, Pricing, Strategic sourcing/offshoring services, Real estate strategy, Environmental & social impact research, Macro/microeconomic research, Market research, Customer feedback, Customer segmentation, Employee feedback, Advanced analytics, Sustainable investment.

Technology & innovation

Ideation, Innovation management, Innovation strategy, Strategies for growth from innovation, Cloud advice, ERP consulting, IT strategy, planning & review, IT training, Programme management, Vendor selection, Clean technology, Green IT, Corporate identity, Graphic & UI design, UX & service design, Customer journey & UX benchmarking, Data visualisation, business intelligence & semantic layer.

Contributors

We are extremely grateful to all the people we spoke to for making this report possible. On this page is a list of individuals who have contributed (excluding those consultants who wished to remain anonymous).

Name	Job title	Organisation
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Karim Haji	Global and UK Head of Financial Services	KPMG
Simon Kent	Senior Partner Financial Services	Kearney
Jim McKeighan	Global Managing Partner	TCS
Scott Mullen	Principal	North Highland
Erik Raper	Portfolio Executive	North Highland
Nathan Summers	Managing Director, Financial Services	Capgemini Invent
Srinivasa Kumar Yerchuru	Vice President and Global Head of Industry Advisory Group in Banking, Financial Services, and Insurance	TCS

Meet the expert

Peter Curry

Peter is a Senior Research Analyst at Source. He is part of the Market Trends team, leveraging insights from his multidisciplinary background to help give people the information they need to make the right decisions. Before joining Source, he completed a Masters in Cognitive Neuroscience and worked as podcast producer across a wide variety of topics, including history and mental health.

Peter Curry

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About us

We help professional services firms **understand what really matters** when facing decisions of vital importance.

The best decisions are based on evidence, objectivity, and a willingness to change. That's why, at Source, we tell you what you need to hear, rather than what you want to hear.

We draw upon our deep roots within the professional services sector to provide firms with a clear picture of their clients' worlds. Through comprehensive research and meticulous analysis, we pinpoint what truly matters and deliver actionable insights that help firms map out the right way forward.

We believe in thriving individually and succeeding together. And we would love to help your firm crack its latest conundrum.

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Publication schedule for 2024

2024	Market Trends Reports	Market Trends Briefings	Client Perceptions Studies	Emerging Trends Programme	White Space Reports	White Space Insights		
Q1	January	India			Client Perceptions of Thought Leadership	Featured thought leadership (monthly) Quarterly webinar series		
	February						Forecasts for 2024 UK GCC France	ET1 Ecosystems
	March							UK US Germany
Q2	April		Financial Services GCC France			Featured thought leadership (monthly) Quarterly webinar series		
	May						Nordics US DACH Australia East Asia	Retail Australia Energy & Resources
	June						South East Asia	Technology, Media & Telecoms China Japan
Q3	July	South America Healthcare & Pharma				Featured thought leadership (monthly) Quarterly webinar series		
	August						Africa Energy & Resources Financial Services Technology, Media & Telecoms	ET3 The Future of Consulting
	September						Sustainability	ET4 Digital Transformation
Q4	October		Risk Tax Audit Technology		Hot Topic Report	Featured thought leadership (monthly) Quarterly webinar series		
	November						Tax Risk Technology	ET5 Expertise
	December						Planning for Growth in 2025	ET6 What Clients Will Want in 2025